

Volunteer Program Interest Card

I am interested in more information regarding the following:

☐ Becoming a Sponsor

☐ Providing a Site

☐ Becoming a Volunteer

☐ Receiving the Site List

Name		E-Mail Address	
Street		Organizations Name (if applicable)	
City	State	ZIP Code	
Home Phone		Business Phone (if applicable)	

The Volunteer Program



Volunteer Income Tax Assistance



Tax Counseling for the Elderly

Joint Programs of the
Franchise Tax Board and the Internal Revenue Service

Prepared by the Franchise Tax Board

What is the Volunteer Program?

The Volunteer Program helps individuals with low income, over the age of 60 or military personnel prepare their state and federal income tax returns. Assistance is available from January 1 to April 15.

There are three programs within the Volunteer Program:

- Volunteer Income Tax Assistance (VITA)
- Tax Counseling for the Elderly (TCE)
- VITA Military (Volunteer Income Tax Assistance for active duty and retired military personnel and their families)

Each of the programs has sponsors and volunteers.

What are the Objectives of the Volunteer Program?

VITA – Volunteer Income Tax Assistance

VITA’s objective is to provide free tax help to people who cannot afford paid professional assistance. Volunteers help prepare basic tax returns for taxpayers with special needs, including persons with disabilities, those with low to limited income, and non-English speaking persons.

TCE – Tax Counseling for the Elderly

The objective of TCE is to provide free assistance with income tax return preparation for persons with middle or low income, with special attention to those age 60 and older.

VITA Military

The objective of the VITA Military program is to help active duty military, retired military, and military family members in the preparation of their state and federal personal income tax returns.

What is a Sponsor?

A sponsor is usually a group or organization recruited by Franchise Tax Board and Internal Revenue Service to organize and manage a VITA, TCE, or VITA Military site within the sponsor’s service area.

Some examples of sponsor organizations:

- Community Centers;
- Libraries;
- Churches;
- Recreation Organizations;
- Schools;
- Cultural Centers;
- Senior Centers;
- Military Bases.

You can provide a valuable service by sponsoring a VITA or TCE site, and coordinating the program in your community. As a sponsor your responsibilities may include recruiting volunteers, scheduling training, providing site location, scheduling volunteer work hours, publicizing your program, ordering supplies, and gathering statistics.

What is a Volunteer?

A volunteer is an individual who volunteers his/her own time to assist taxpayers in completing their federal and state income tax returns, answers basic taxpayer’s questions, and distributes forms. This service is always provided free of charge.

Can I be a Volunteer?

You qualify if you...

- Enjoy meeting and dealing with a variety of people;
- Have experience or enjoy learning about income tax preparation;
- Have some administrative or publicity experience;
- Take pride in complete and accurate work;
- Are willing to complete the IRS and state training programs; and
- Can volunteer from January 1 through April 15.

What is a Site?

A site is a service location where taxpayers can go to ask questions or receive free assistance from trained volunteers in filling out their federal and state income tax returns.

What is a Site List?

A site list is a list of all sites (VITA, TCE, and VITA Military) that provide taxpayer assistance in California. The site list is distributed to legislative and congressional offices, social security offices, FTB and IRS information centers, state and locally- funded information and referral centers, and other referral organizations. These organizations use the list to refer taxpayers to the volunteer sites.

The site list is also available on the Internet at www.ftb.ca.gov.

The site list is updated and distributed through the Internet weekly. Paper copy distributions are made every three weeks.

Is Training Provided for the Volunteers?

FTB and IRS provide free training for the volunteers.

The training provides instructions for the preparation of simple income tax returns, volunteer forms, and volunteer procedures. The regular training class lasts about 40 hours (32 hours, divided into four eight-hour sessions covers federal law and procedures, and one eight-hour session covers state law and procedures). Experienced volunteers are usually offered a condensed version of the regular class.

What is e-File and is it Available at a Volunteer Site?

e-File means sending federal and state income tax returns from a volunteer site to the IRS and FTB over telephone lines using a computer.

What are the Benefits of e-File?

- Paperless, no forms to send.
- More accurate than paper returns.
- Gives the taxpayer a faster refund than paper returns.
- Allows refunds to be deposited directly into the taxpayer's bank account.
- Provides confirmation within 24 to 48 hours as to the status of the return.

Who do I Call to get more Information about being a Sponsor or Volunteer?

To get more information about being a sponsor or volunteering for the VITA/TCE Volunteer Program, please contact the Public Education Team at (800) 522-5665.

Contacts

Franchise Tax Board Volunteer Program
(800) 522-5665
(FOR VOLUNTEERS ONLY)

Franchise Tax Board General Information
(800) 852-5711

Internal Revenue Service Volunteer Hotline
(800) 829-8482

Internal Revenue Service Hotline
(800) 829-1040

e-File Information (Franchise Tax Board)
(916) 845-0353

Automated Toll-Free Phone Service
(800) 338-0505

Assistance for persons with disabilities:
We comply with provisions of the Americans with Disabilities Act. Persons with hearing or speech impairments, call:

From Voice phone (California Relay Service)
(800) 735-2922

From TTY/TDD (Direct line to our customer service)
(800) 822-6268

Place
Postcard
Stamp
Here

PUBLIC EDUCATION TEAM
FRANCHISE TAX BOARD
PO BOX 651
SACRAMENTO CA 95812-0651